



1201 North Third Street ▪ Jacksonville Beach, Florida 32250 ▪ (904) 241-0050 ▪ Fax (904) 241-0752
taxadvantage@taxadvantage.org

PERSONAL TAX WORKSHEET

INCOME

___ **W-2's – All Employees**

___ **1099's**

Interest from Banks
Investment Dividends
Stock Sales/Losses
Pensions/Annuities
Prizes/Bonuses
Social Security
Retirement Withdrawals

___ **K-1's**

Activity Reporting for
Business Investments

___ **Rental Property**

Income/Expenses

___ **Alimony Received**

___ **Business Income/Expenses**

Request Business Wkst/See
link at www.taxadvantage.org

DEDUCTIONS

___ **Medical Expenses*****

(Out-of-Pocket)
Insurance Premiums
Prescriptions
Dentist/Doctors
Eyeglasses/Contacts
Nursing Home/Rehab
Misc.

___ **Taxes**

Real Estate Taxes
State/Personal
Sales Tax/Large Purchases

___ **Interest Paid**

Mortgage
2nd Mortgage (Home)
Lines of Credit
Home Equity Loans
Student Loans
Investment Interest

___ **Charitable Contributions**

Place of Worship
Charitable Organizations

___ **Educational Expenses**

1098-T
Books/Supplies

___ **Energy Efficient**

Improvements

Renewable Sources (Solar/
Wind/ Geothermal /Fuel
Cells)

MISCELLANEOUS

___ Real Estate Transactions
___ Closing Statements/Refinance
___ Contributions to Retirement
___ Accounts
___ Moving Expenses (Military)
___ Alimony Paid
___ Loss from Theft, Fire or
___ Vandalism, Storm damage

___ Any transactions related to
crypto currency. i.e. Bitcoin etc

___ Childcare that is with a
registered business, incl EIN,
Name of facility & amount paid.
i.e. Daycare, Afterschool Program

___ **1095-A Healthcare Forms**

*****Must exceed 10% of
adjusted gross income.
Tip - Use your gross income,
if it is close to 10% include
the medical out-of-pocket
expense.**